



Draft Perfect Learning Breakout Session

IDENTIFYING AND DELIVERING SKILLS FOR THE FUTURE INFORMATION PROFESSIONAL

Context for the breakout session

This era, post-globalisation of information services, means more stringent demands on Information Leaders, and (some think) limits opportunity to bring on aspiring leaders as new entrants.

The breakout session was to look at how we are to develop the information leaders of the future, given that off-shore units reduce the means for the up-and-coming to gain experience or learn by absorption in the UK.

Purpose

The objective of the breakout session was to think through the likely patterns of evolution in globalised information services and what this means in terms of the professional profiles and development paths of individuals in a global team.

In particular, we would think through three key questions:

- How can junior staff best develop themselves
 - How can senior managers actively bring on the next generation
 - Where will recruiting managers go if they want to acquire skilled “second jobbers”
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Intended Outcomes

- Demand for IP skills; shared evidence for change
- What will our services/disciplines look like?
- Identification of skills/ education gaps and how to close them.

ACTUAL OUTCOMES

Summary

This workshop did not run on the day because of insufficient numbers.

The notes and comments here are from the Facilitator, Julia Hordle, who was on stand-by to take the session on the day. There are also notes from last year's session on a similar topic.

It should be noted that this session was borderline at the planning stage, and therefore not promoted/prepared for as some of the other sessions which were flagged up and show-cased in fine detail early on.

HOW CAN JUNIOR STAFF BEST DEVELOP THEMSELVES

Summary

We can borrow some basic points from the breakout session in 2004, looking at "Identifying & building skills for the future information professional"

*Information professionals need to be able to take an **entrepreneurial view** and need "**Consulting**" skills on an everyday basis. This will equip them for responding to ongoing change and ensure they are able to capture the attention and interest of customers and stakeholders.*

"Soft skills" pre-occupied the group which chose not to discuss more technical aspects of an IPs role.

The delegates concluded that the present Library & Information courses were not producing professionals who are adequately prepared for the workplace today, and that capacity to improve and educate "on the job" is limited, with opportunities or access to the right courses being very inconsistent.

Attributes requiring active investment of time or money

- Ability to communicate with Executives, as a peer
- Understanding of business imperatives
- Ability to work with client facing staff, to their priorities
- Ability to put marketing and promotional techniques into practice for the good of the Research/Information Service
- Ability to relate to and team with peers from other disciplines in order to resolve problems and take a progressive view
- Analytical skills to find and apply solutions to problems
- Ability to detect and respond to changes in workflow

- Project Management skills – delivery & accountability
- Ability to review progress against objectives and to appraise progress critically and methodically to ensure goals are achieved
- Origination skills - spotting new opportunities to supply services inside and outside the organisation

An ability to raise the role from “technician” to a “consultant” depends on three elements:

- Personality in the individual
- Conditioning and mentoring in academia and in the workplace
- Education, in particular easy access to specific Continuous Professional Development (CPD) courses and programmes

How can Junior staff best develop themselves?

Some basic assumptions and discussion points;

- Skills

The skill-set of the trained information professional is powerful, especially when combined with other good methodologies or subject matter expertise. Providing the skills can be applied appropriately, and the net value explained clearly to colleagues, influencers and customers, then IPs are well placed to advance themselves in business

- Context

Recruitment trends show that in order of preference, clients/hirers prioritise attributes in the following way

1. Environment: does this person understand our terminology/culture/fee-earning models?
2. Can the person use our tools/sources/infrastructure
3. Can the person solve problems, relate to our fee-earners?
4. Is the person qualified?

Qualifications underscore quality and give a career longevity. They can also be limiting.

Observations

Many of the examples given of off-shored solutions involve models from investment banking, but it should be borne in mind that the lbank model is distinctive in that there is a high volume of transactional research/information requests, and having a cheaper resource in a different time zone carries additional benefit in a 24/07 culture.

Although speed is important for competitiveness, especially in the bid/business pursuit cycles, some organisations have a little more time to deliberate or to anticipate demand.

If the ratio of continuity/consistent processes outweigh ad hoc projects, then proximity to the user group becomes more important and it is more likely that professionals will be engaged in forward-looking, forecasting and client focused work. Proximity to fee-earners where this is the case is vital, else rapport and the ability to learn in an immediate way diminishes.

Observing actual shifts in responsibility in professional services firms, which off-shored early, there have been at least five emergent paths for professionals who started off or wish to start their career in information work:

- **Information Services**

Fewer individuals employed at length, but specialists still maintained for:

- Sourcing and procurement
- Synthesis of information from a wide variety of sources
- Alerting services
- Enquiries

The off-shore element has given:

- More capacity for repetitive work
- More time available per enquiry
- Little decay in quality or deadline
- Great attention to detail.

- **Research & Analysis**

Greater opportunities to develop niche specialisms:

- Context
- Opinion
- Conclusion
- Thought Leadership
- Communications
- Methodology

- **Technology/Content**

- Develop repositories of information
- Improve access to information
- Improve presentation/relevance of information
- Refine; edit, consult, outreach, publish
- Training/professional development
- Tools & Taxonomies
- Applications (i.e. business delivery not software)

- **Organisational/ Practice Development**
 - Bid/Business development support
 - Professional Development Support/Learning
 - Thought Leadership

- **Engagement/ Client work**
 - Utilisation in client-billable work
 - Influence development of research output (pull factor)
 - Develop commercial/business knowledge
 - New service development, leveraging organisational assets
 - Fee-earning, pipeline development
 - Opportunity

What are the implications for new Entrants to the Profession?

The intrinsic skills in library/information management are still valuable, even if a general apprenticeship/ mentoring is harder to come by.

New entrants are being selected for their positive attitude, communication skills and intellectual rigour.

A genuine interest in the organisation is essential for new entrants because relationships and identification with the business is extremely important. In other words not just relying on good relationships with colleagues in a close skills group.

This being the case, we are already seeing organisations preferring to take on individuals with industry experience over generalists, because of the risks inherent in taking on someone who is new, not-performing.

This risk is exacerbated by the degree of importance placed by relationship - building with fee-earners – as the need for personal impact increases within a business support function, so there is less time to integrate a new person, and less capacity for people to gain experience on the job.

This is not a new phenomenon, as for some time, managers have hired people a mixture of people with good skills and methodology, and people with good impact to create a mix in their teams.

The difference is that the higher information professionals have to be in the “value-chain” in order to establish themselves, the higher the barrier to entry.

This will lead to:

- Development of more sophisticated training and development regimes for permanent staff with information skills
- Development of critical training for staff without information qualifications in hard information skills
- Active retention policy for senior staff, post-off-shore
- Further diversity in deployment of information management skills, better penetration into the business
- Further demand.

Hirers currently have an abundance of choice.

If they are ready to invest time in their new employee, they have a very diverse pool from which to choose a new employee. There is still a consistent level of quality available from information schools, and there is a lot of cross marketing possible to attract people from inside and outside the industry, inside and outside information disciplines. It is possible to focus on potential output rather than a broad overview.

Does this mean it will become impossible for information specialists to get a structured training?

Even with the dissolution of large centralised information departments, there appears to be enough demand for every one to find their place.

Some information specialists have left the profession; but this always happens with waves of change. There is little evidence of unemployment although people affected by redundancy may find it difficult to regain exactly the same level of pay and responsibility.

Development

Achieving excellence: advancement and longevity in the post-off-shore environment seems to be through skills, aptitude and force of personality. Technology has lifted the burden of process in many roles, so there has been a shift towards individuality and solutions finding, away from repetition.

The attitude shift in those steering information services through globalisation and change has pushed people to focus on consistent excellence, and made them more mobile. Successful professionals have now to be tolerant of stretched working hours, of travel, of secondments either from a centralised function to client departments or between offices and inter-functionally to get change and tasks completed.

The term information consultant has been used glibly at times, but this consultation—and-solutions way of working will rapidly outmode others.

How Can Senior Managers Actively Bring On The Next Generation?

Ways to refresh the profession

Recruitment & induction

- Vary the channels for staff recruitment
- Move from homogenous educational backgrounds to acquire a mix of skills related to departmental function and strategic plan
- Take care not to recruit in your own likeness, recruit for complementary skills
- Use a comprehensive induction programme to manage expectations – setting very high standards and guidelines for approaching change from the outset. Condition staff to expect to take a management profile – avoid low key approach from the outset.
- Ensure induction programmes for end-users to help them engage the library/research team in the right way
- Encourage secondments of staff through your unit and encourage IPs to be seconded outside or be affiliated to key project and strategic groups.
- Make sure influential staff are visible throughout the organisation
- In any small way try to improve overall perception of the value of specialist research and information skills

The delegate group felt that the profession is mistakenly regarded as low key in some quarters and this impacts on the quality of new joiners.

The group also thought that re-evaluation and service delivery adjustments should be continuous.

There was a fear that with active off-shoring, employers will take on insufficient numbers of new graduates to maintain research standards - this spoken fear was one of the reasons the topic was chosen for a breakout session in 2005.

Team development

- Active coaching and mentoring. This is vital for senior and junior staff. Senior people who mentor their staff but are not mentored in return. Have the courage to ask or lobby for this if not in place.

- Ensure staff are fully aware of their individual skills and attributes and of each others.
 - Teams should not only recruit for a mix of staff but promote the whole mix in its diversity. It was pointed out that technically-able information specialists can often be overshadowed by noisier, creative colleagues, and recognition of individual contribution improves the standing of the team as well as the self-esteem of the team members.
 - Recognise experience and education equally – don't distort values on the basis of qualifications alone
 - Quality control – several members of staff in a big team needed to monitor output – this needs to be built into people's job specifications – often omitted.
 - Give commitment to the development of the individual as well as the infrastructure, especially where they have been de-layered and promotions *per se* are limited.
 - Teams need to ask for access to team building exercises and techniques if they do not have this already.
 - Teams need to publicise successes and contribution, be seen to be delivery focused, not overly bogged down in processes.
 - Build job descriptions with variety of tasks and processes in them, including thinking, improvement time – time to think and scope for individual strengths to flourish.
- If you are not a manager of staff, negotiate yourself to achieve this.

Further education & training for the individual

- Lobby heavily for resources
- Identify or develop courses to assist development of subject matter expertise as well as practical discipline e.g. IT skills
- Try to influence universities and special interest groups, third parties in your training ideas
- Be prepared to teach information skills for business graduates as well as business to information graduates
- It was felt that the Chartership programmes could be unwieldy, and also that accreditation for non-library disciplines is difficult to get.
- As expectation of researchers have risen, so employers should be encouraged to consider inclusion on and sponsorship for vocational course related to business, management etc. This could relate to giving access to courses development for executives, to giving money, materials or time. Specifically this should also mean access to structured management training for information staff.
- Time for refreshing core skills. Senior delegates commented that with a heavy workload of man and project management tasks, hands on research skills suffer. Refresher courses should be built in to keep understanding current, and to keep team's confidence in managers' research and thought-leadership abilities.

Early empowerment v. risk management

The group felt it is essential to grow people through the team and to give responsibility, get accountability as early as possible after induction. The quality and the expectations of a new entrant are now very high, with newcomers expected to make an impact, on their team or project, very early on in their career. For the able few, this means a rapidly rising star.

Economic confidence

- It was observed that, if training and recruitment budgets have been slashed, we need to set out a fresh business case for these to resume.
- It was commented also that budgets for salaries have a big impact on successful team building – getting skills but also keeping skills. One delegate recommended relentless persistence, year on year as the only way to make progress.
- It was also commented that lobbying “best customers” is a good way to ensure further investment and creates room for values and value judgements to improve.
- Dialogue between line management, strategy setters, HR, Information and staff should be consistent, however, it was stressed that individuals are firstly accountable for their own development and its is mistaken rely on organisations to take the initiative.

Proposals

It was commented that lobbying and planning need to be sensitive to the climate of confidence with an organisation but it was commented that to achieve improvement you need to be prepared to present a formal strategy and business case. This forms a basis for discussion and is likely to be taken more seriously than unsubstantiated remarks.

Motivating and Rewarding staff of 5 + years experience

There was a free discussion in the group about realistic expectations of staff and the flow of talent into and outside the industry.

- It was agreed generally that fluidity within teams is a good thing, and we should expect more people to leave the profession when reaching an impasse
- It was commented again that it is dangerous to have staff dedicated to one activity only e.g. research – teams need variety to be able to make the most of individual talents
- It was recommended that whilst service output and quality levels need to be clearly defined – creating a climate of excellence, individual job descriptions need to be kept loose to allow for change
- Convincing budget holders of value of staff and services is key to the managers role – managing upwards as well as within the team

The discussion on motivation led to a discussion on salaries again.

Getting Salaries right

- When benchmarking salaries, superficial information on market rate is not sufficient. This is because:
 - When under cost reduction pressure, seniors expect more with less
 - Published salary surveys don't differentiate sufficiently and don't take quality into account, or recognise specific experience
- Important to negotiate strongly, not remain passive
- Staff turnover can assist with budget management, but may have implications for quality
- Implications of off-shoring culture:
 - Industry will see improvement in quality and contribution of staff but through market pressure, salaries will hold stable
 - Managers will have to think through and prepare for career development options, and sell research/information roles as an excellent means of acquiring commercial skills and strategic thinking

- Being seen to hire excellent staff will help support salary increases

The group discussed the potential to discuss benchmarking of individuals by workrate; contributors from larger teams commented that workrate issues were addressed already by KPIs (key performance indicators) and service level agreements.

- The cost of hiring inexperienced people and having throughput is mainly in time – it takes time to achieve consistent standards. The hidden costs of recruitment, training and re-training have to be taken into account if standards are to maintain or improve.

Although there is a big implication for absolute cost savings in off-shoring/outsourcing, these aspects of professional development apply whether the team is based in the Barbican or Bangalore. As differentials close and service models mature, so the demands on experienced information professionals here will be begin to be vested overseas as well; even if the management is remote.

Availability of “Second Jobbers”

To ensure a suitable choice of candidate, organisations will have to consider how best to hire.

In investment banking, it is an understanding of the industry and the culture which makes good people stand out; in some other sectors there is still a skills shortage of people who understand the fundamentals of good information practice, so precedence goes to qualified staff.

In some sectors, there has been a willingness to recruit from outside the profession for some while in order to complement a core of information professionals. Specialist recruited originally for their communication or internal marketing skills, for example have now had an opportunity to learn information skills in situ.

A number of the academic institutions have been more active in encouraging active links with business so graduates emerge with a practical as well as theoretical view of what is useful.

In summary – there will be no shortage of individuals with a true interest in Information Services, but employers will have to make a choice; to hire skills from a different sector, to develop their own skills in house, or to utilise their connections with off-shore providers and encourage secondments/ movement from lower cost countries to re-locate to the UK, if emerging roles cannot be dealt with off-shore.

Conclusion

These notes have been produced as a combination of observations cleaned from the 2004 and 2005 conferences, and the facilitator's preparation. This means that the notes can only form a discussion document.

Any comments and contributions welcome, especially to flesh out the shape of Information Services to come. Please contact either Julia Hordle on julia@intelligentresources.com or Joanna Cramoisan on JoannaC@perfectinfo.com

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